

**STATE OF WISCONSIN
CLASSIFICATION SPECIFICATION**

MEDIGAP INSURANCE SPECIALIST-LEAD

I. INTRODUCTION

A. Purpose of This Classification Specification

This classification specification is the basic authority under ER 2.04, Wis. Adm. Code, for making classification decisions relative to present and future professional positions located within the Board on Aging and Long Term Care. The position allocated to this single position classification provides health insurance counseling and information to Medicare-eligible citizens and serves as lead worker to Medigap Insurance Specialist positions. This classification specification will not specifically identify every eventuality or combination of duties and responsibilities of positions that currently exist, or those that result from changing program emphasis in the future. Rather, it is designed to serve as a framework for classification decision-making in this occupational area.

Classification decisions must be based on the “best fit” of the duties within the existing classification structure. The “best fit” is determined by the majority (i.e., more than 50%) of the work assigned to and performed by the position when compared to the class concepts and definition of this specification or through other methods of position analysis. Position analysis defines the nature and character of the work through the use of any or all of the following: definition statements; listing of areas of specialization; representative examples of work performed; allocation patterns of representative positions; job evaluation guide charts, standards or factors; statements of inclusion and exclusion; licensure or certification requirements; and other such information necessary to facilitate the assignment of positions to the appropriate classification.

B. Inclusions

This classification encompasses a single position located within the Board on Aging and Long Term Care that provides informational and referral services to the consumers of insurance for the elderly and persons with disabilities through operation of a telephone helpline and other public information efforts. The position allocated to this classification serves as lead worker to Medigap Insurance Specialist positions.

C. Exclusions

Excluded from this classification are the following types of positions:

1. Positions that meet the statutory definitions of supervisor and/or management as defined in ss. 111.81(19) and (13), Wis. Stats., as administered and interpreted by the Wisconsin Employment Relations Commission.
2. Positions located outside Board on Aging and Long Term Care.

3. Positions that provide health insurance counseling and information to Medicare-eligible citizens a majority of the time (more than 50%) but are not assigned the lead worker responsibility and are more appropriately classified as Medigap Insurance Specialist.
4. Positions that provide professional counseling services in the areas of vocational rehabilitation, social work, psychology, or other human services specializations a majority of the time (more than 50%).
5. Positions that provide ombudsman and advocacy services to individuals residing in long term care facilities and their families a majority of the time (more than 50%) and are more appropriately classified as Ombudsman Services Specialist.
6. All other positions that are more appropriately identified by other classification specifications.

D. Entrance Into This Classification

Employees enter this single position classification by competition.

II. DEFINITIONS

MEDIGAP INSURANCE SPECIALIST - LEAD

This position provides health insurance counseling and information to Medicare-eligible citizens and their representatives and refers consumer complaints to the Commissioner of Insurance or to the Centers for Medicare and Medicaid Services. This position provides direct counseling by telephone, written and electronic correspondence and/or in person to consumers regarding enrollment into Medicare, private Medicare health plans, or Medicare Prescription Drug options, purchase or replacement of Medicare supplemental health insurance, hospital indemnity, health maintenance organization, long-term care, nursing home, home health care, and other insurance products marketed to the elderly or to persons with disabilities. This position may also provide counseling related to Medicaid issues, including spousal impoverishment, estate liability, Medicare savings programs, or counseling on employee-related coverages, active employer, retiree, and COBRA/continuation coverages, and SeniorCare. This position is responsible for providing training to other professional agencies and consumer groups; and developing informational materials for public dissemination. Additionally, this position provides technical assistance and materials to employees of local, regional, and statewide aging network providers and provides technical support and guidance to Medigap Insurance Specialist positions. This position recruits, trains and monitors the activities of Medigap Volunteers who assist the Medigap Helpline Services programs. This position serves as liaison to other departments of state government regarding insurance concerns of elderly persons and persons with disabilities.

III. QUALIFICATIONS

The qualifications required for this position will be determined at the time of recruitment. Such determinations will be made based on an analysis of the goals and worker activities performed and by an identification of the education, training, work, or other life experience which would provide reasonable assurance that the knowledge and skills required upon appointment have been acquired.

IV. ADMINISTRATIVE INFORMATION

This classification was originally created as a result of a Personnel Management Survey, effective October 16, 1994, and announced in Bulletin No. CC/SC-28, as part of the Medigap Insurance Specialist series. This classification was modified, effective May 30, 2004, and announced in Bulletin OSER-0032-MRS-SC, to distinguish the “Lead” level from the “A, B” series that was set up for pay progression negotiated in the 2003 – 2005 collective bargaining agreement between the State of Wisconsin and the Wisconsin State Employees Union.

The specification was revised effective August 9, 2015 and announced in Bulletin DPM-0404-CC/SC to reflect the updating of the language and the broadbanding of the classification.

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